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# Policy Brief

## MDGs, Social Justice and the Challenge of Intersecting Inequalities

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### A Social Justice Agenda for the MDGs

A decade ago, 189 of the world's leaders signed the Millennium Declaration, committing themselves to co-ordinate action on one of the world's most pressing and deep-seated problems: the persistence of extreme poverty. It is important to underscore that the Declaration was based on a set of fundamental values, including freedom, equality, tolerance and solidarity, which together spelt a firm commitment to social justice as the guiding spirit for all MDG efforts (UN, 2000).

The Declaration was subsequently translated into eight Millennium Development Goals in order to provide an agenda for action. These included halving extreme poverty and hunger by 2015, promoting health and education for all and tackling gender inequality. Ten years after the Declaration, it is undeniable that there has been progress on many of the goals.

But it is also evident that a focus on the fundamental values of the Declaration has been lost in the process of agreeing on an actionable agenda. Moreover, the decision to measure progress on the MDGs in terms of national and international 'averages' and 'proportions' has meant that the unequal pace of this progress across social groups—as well as indeed the systematic exclusion of some of them—has been ignored.

### Systematic Social Exclusion

This paper summarises the key arguments put forward on this problem in a report commissioned by the [UN MDG Achievement Fund](#) (Kabeer, 2010). This report points out that in almost every society and in almost every region of the world, certain groups of people face systematic social exclusion as the result of multiple inequalities that constrict their life chances. These include:

- Cultural inequalities: forms of discrimination and 'de-valuation' that assign members of these groups with lesser status and worth than others;
- Spatial inequalities: such groups frequently live in places that make them harder to reach, or easier to ignore;
- Economic inequalities: these groups are often disadvantaged by an unfair distribution of assets and opportunities; and
- Political inequalities: they are deprived of voice and influence on the critical issues that affect their lives and their communities.

Each of these inequalities is a source of injustice in and of itself. But it is the mutual—and intersecting—nature of these inequalities that reinforces the persistence of social exclusion over time and its resistance to 'business as usual' approaches to the MDGs.



The MDG Fund report focuses on these forms of exclusion, which are based primarily on inherited rather than circumstantial disadvantage. Caste, race, ethnicity, language and religion are among the most common markers of such exclusion. In addition (as elsewhere in society), gender cuts across all these dimensions so that women and girls from marginalised groups generally fare worse than men and boys.

While recognising that social exclusion affects people in many regions, the MDG Fund report focuses on three: Latin America, Asia and sub-Saharan Africa. In the next sections, we draw on examples from these regions to make a number of key points:

- First, social exclusion is pervasive across the world;
- Second, the disadvantages associated with social exclusion begin in the early years of life and generally persist across the life course, sometimes across generations;
- Thirdly, there is a cumulative nature of the disadvantages associated with social exclusion: those left behind in relation to one set of MDGs also tend to be left behind on others.

### Intersecting Inequalities in Latin America

Historically, Latin America has been one of the most unequal regions in the world. However, recent trends provide some basis for cautious optimism. For example, average levels of moderate and extreme income poverty have decreased in much of the region.

Since Latin America is one of the few regions to collect and synthesize data disaggregated by ethnicity, we can observe, however,

that extreme poverty remains much higher among indigenous people and Afro-descendants than among the white population in a large number of countries.

In addition, ethnic identities are closely associated with ‘deficits’ in human development. Ethnic groups have lower rates of enrolment at all levels of education, their children are more likely to die very young, and those who survive are more likely to be undernourished. Ethnic differences in maternal mortality are particularly pronounced. For instance, in Ecuador in 2003, the national maternal mortality rate was 74 per 100,000 live births whereas it was 250 among remote indigenous communities.

Spatial and ethnic inequalities can also intersect. In Mexico, for instance, the poorest southern states (Chiapas, Oaxaca and Guerrero), which are home to around 75% of the country’s indigenous peoples, report far lower levels of education than the national average and far higher maternal mortality ratios. In Guerrero, the maternal mortality ratio of 128 deaths per 100,000 live births is nearly five times the ratio in the more developed northern state of Nuevo León, which is about 27 per 100,000.

## Intersecting Inequalities in Asia

Evidence from Asia suggests that prior to the economic crisis there had been strong economic growth and major reductions in poverty across much of the region. But there was also a significant rise in income inequalities.

**Table 1: Rising Inequalities in Asia (Gini Coefficients)**

	Initial Year		Final Year	
	Gini	Year	Gini	Year
Bangladesh	28.3	1991	34.1	2005
Cambodia	31.8	1993	40.7	2004
PRC	40.7	1993	45.5	2004
India	32.9	1993	36.2	2004
Indonesia	34.4	1993	34.3	2002
Lao PDR	30.4	1992	34.7	2002
Malaysia	41.2	1993	40.3	2004
Mongolia	33.2	1995	32.8	2002
Nepal	37.7	1995	47.3	2003
Pakistan	30.3	1992	31.2	2004
Philippines	42.9	1994	44.0	2003
Sri Lanka	34.4	1995	40.2	2002
Thailand	46.2	1992	42.0	2002
Vietnam	34.9	1993	37.1	2004

Source: Ali and Zhuang, 2007

Between the early 1990s and the early 2000s, the Gini index (the most common measure of inequality) rose in 14 Asian countries out of a sample of 20 with relevant data (see Table 1).

The rise in inequality helps explain why poverty reduction has been relatively slow among ethnic groups. In Nepal, for example, the overall decline in poverty between 1995 and 2003 varied from 46% for the upper caste *Brahman/Chhetri* groups to 10% for indigenous Janajatis living in the hills and 6% for Muslims.

As in Latin America, the greater income poverty of socially excluded groups has translated into lower levels of human development. For instance, *Dalits* (‘untouchable’ castes) and *Adivasis* (tribal groups) in India continue to suffer under-five mortality rates that are much higher than the national average. In Nepal, despite the rise in overall literacy rates from 23% in 1981 to 54% in 2001, 52% of Hill *Dalits*, 47% of Tarai *Dalits*, 48% of Muslims

and 30% cent of Hill Janajatis had never attended school.

In Asia, it is also evident that the linkages between ethnicity and location can also act to widen differentials in income. For example, the ethnic minorities in China, who are largely concentrated in the underdeveloped western region, comprised 8.4% of the population in 2003 but 46% of the people living in extreme poverty.

In contrast, Malaysia stands out in the Asian context as a country that has made rapid strides in closing ethnic disparities. While poverty has always been higher among the majority ethnic community, the *Bumiputera*, it has actually declined more rapidly among this group than among the ethnic Indian and Chinese populations. Also, while infant mortality rates declined steadily between 1970 and 2006 for all ethnic groups, the differentials among them also decreased, to the benefit of the *Bumiputera*.

While Malaysia is frequently held up as a country in which far-reaching affirmative action policies (with respect to education, land ownership, public service employment, and ownership of companies) seemed to have worked, its success stemmed from the simultaneous pursuit of both affirmative action and structural economic change. It is unlikely that one or the other policy on its own would have achieved the same degree of success.

## Intersecting Inequalities in sub-Saharan Africa

Sub-Saharan Africa (SSA) has the highest rates of poverty in the world and is home to some of the most unequal countries in the world. However, data on poverty by social group in Africa are sparse and rarely up to date. Because of the spatial concentration of ethnic groups, region or location is frequently used as a crude proxy for ethnicity.

In Nigeria, for instance, the northern predominantly Hausa-Fulani states have higher levels of poverty than the southern, predominantly Yoruba and Igbo states. Similarly, in Ghana while the national poverty rate in 2005/6 was 28.5%, it was over 52% in the northern areas of the country, where the most disadvantaged ethnic group, the Mole-Dagbani, lived.

South Africa is one of the few countries in the region that is on track to meet most of the MDGs but its average improvements mask deeply-entrenched inequalities. While poverty has fallen in the post-apartheid period, it remains acute for African and coloured populations. For example, while African incomes were about 16% of white incomes in 1995, this ratio had actually declined to 13% in 2008.

While there have been substantial improvements in South Africa on educational attainments at the primary level, sharp racial differences persist at higher levels. While 86% of white 9th graders in 2002 had reached grade 12 by 2005, only 29% of African and 42% of coloured children had done so.

## Why Social Exclusion Persists

The evidence cited in the preceding sections underscores our general point that the intersecting and mutually reinforcing character of inequalities makes them remarkably resistant to change. But such inequalities are not immune to reforms. Change is evident in every region, though it has been more rapid in some contexts than others, and more rapid on some MDGs than others. Policymakers who want to tackle social exclusion need to understand both sides of this equation: what explains the persistence of social exclusion and what measures have achieved progress. We deal with the first side of this equation in this section.

## The cultural dynamics of exclusion

Cultural ‘de-valuation’ is a key mechanism through which social exclusion is perpetuated over time. Such a mechanism can work in

silent and invisible ways that nevertheless have a profound impact on those who are excluded in this way; or it can work in ways that are visible and noisy, with negative spillover effects on the larger society.

In Nepal, a new constitution adopted in 1990 was designed to reverse official endorsement of long-standing caste and gender discrimination, but inherited inequalities have continued to adversely affect the lives and life chances of those at the lower end of the social hierarchy. For example, a recent survey revealed that the upper castes scored twice as high as *Dalits* on knowledge about rights and procedures, confidence in accessing services, and ability to exercise rights, benefit from social networks and have local political influence.

A revealing experiment from India found that *Dalit* school children performed as well as children from other caste groups in solving puzzles when caste identities were concealed. They performed less well when their caste identities were revealed, and even more poorly when the children playing the game were segregated into separate caste groups. If such a finding can be generalised, it suggests that the ‘internalisation’ of ascribed inferiority has a powerful effect on the capacity of excluded groups to respond to social and economic opportunities.

### The economic dynamics of exclusion

Economic discrimination frequently operates through cultural norms and practices that define one’s social position. In some cases, excluded groups are not permitted to own or buy land by virtue of who they are. This has long been the case for the ‘untouchable’ castes in India and Nepal, and even today the vast majority of people belonging to these castes are landless.

In other cases, ethnicity determines the amount and quality of land people own. In Ecuador, for instance, only 13% of all irrigated land is in the hands of indigenous farmers. Indigenous people are also more likely to be dispossessed of their land because their customary tenure systems are not recognised by law. The lack of official recognition of customary land arrangements for forest dwellers and upland people throughout the developing world has been a major factor in their impoverishment.

The kind of livelihoods pursued by excluded groups can constitute a major factor in reproducing their poverty and excluded status. In Thailand, for instance, the reliance of the Hmong, Akha, Lahu and Lisu on swidden agriculture in upland forested areas is perceived by others to signify their ‘uncivilised’ way of life, in contrast to the settled wet rice cultivation practised by lowland villagers.

In other cases, there is a cultural assignment of excluded groups to the worst paid and most demeaning jobs. The Hindu caste system in India and Nepal assigns, for example, the lowest castes to the removal of night soil, sweeping, garbage collection and other jobs considered to be menial, degrading and dirty.

More generally, a combination of discrimination and associated lower levels of educational attainment keep socially excluded groups confined to lower paid work and more exploitative working conditions. In Vietnam, for instance, migrants from ethnic minorities earn half as much as those from the Kinh majority, are far less likely to have a work contract, and are far less likely to receive help in finding a job.

In both South Africa and Brazil, the interaction between gender, ethnicity and class generally places women from ethnic minorities at the bottom of the income hierarchy: In Brazil, Afro-descendant women consistently earn the least, while white men consistently earn the most for each level of education. For example, based on having 15 years of schooling or more in 2002, white men earned

more than twice as much as black women with the same high level of education.

In South Africa, African women reported the highest incidence of individual-level income poverty (68%) in 2008 while white men reported the lowest (3%) (see Table 2). Coloured females reported a poverty incidence of 36%, Indian-Asian females reported 11% and white women 4%.

**Table 2: Individual-Level Poverty by Race and Gender in South Africa**

	Head Count Poverty (Poverty Line - R515 per capita per month)		
	1993	2000	2008
African female	0.72	0.66	0.68
African male	0.66	0.61	0.60
Coloured female	0.32	0.32	0.36
Coloured male	0.29	0.30	0.35
Indian/ Asian female	0.12	0.11	0.11
Indian/ Asian male	0.12	0.09	0.19
White female	0.05	0.06	0.04
White male	0.06	0.08	0.03

Source: Leibbrandt et al., 2010

Lack of access to financial services, or access on extremely usurious terms, has been a major constraint for socially excluded groups everywhere. In India, Pakistan and Nepal, the prevalence of bonded labour among lower caste and ethnic minority groups is a stark indicator of the unfavourable terms on which such groups obtain credit. Moreover, such forms of indebtedness can serve as a mechanism for the inter-generational transmission of poverty, since the children of bonded labourers often become bonded labourers themselves.

### The dynamics of exclusion in service provision

Poor socially excluded groups, more than any other group, rely on basic public services to meet their needs for health and education. The failure of such services to address their needs is a major factor in explaining the uneven pace of progress across social groups on the MDGs focused on social conditions.

In India, the most important source of variation in the public per capita provision of doctors, nurses and teachers in rural districts is differences in religion and caste: the higher the percentage of *Dalits* and Muslims in the district population, the lower the provision of medical and educational services. Caste and religion also affect the quality of health services.

Acts of discrimination against *Dalits* are frequently reported in the public health services, along with prejudice towards religious minorities. Discrimination includes avoidance by health workers, particularly paramedics and nursing staff, of physical contact with *Dalits* and reluctance to visit *Dalit* households. In turn, both real and anticipated discriminatory behaviour by health workers deters *Dalits* from using health providers, particularly for services that involve physical contact, such as giving birth.

Ethnic differentials also affect service provision in Vietnam. Although only 17% of women give birth without a trained health worker in attendance in the country as a whole, the higher percentages of 33% in the Northeast, 40% in the central highlands and 65% in the Northwest do so. These are poor mountainous regions with sizeable ethnic majorities.

In Nigeria there are large disparities in social conditions between north and south. Only 4% of women in the Northeast, where ethnic



minorities predominate, receive care from a doctor compared with 52% of women in the Southwest. Also, only about 8% of mothers in the Northwest deliver their babies in a health facility compared with about 74% of women in the Southeast.

In Ghana, there are significant differences in access to electricity, water and sanitation across the four main ethnic groups, the Akan, Ga-Dangme, Ewe and Mole-Dagbani, with the latter being the most disadvantaged and excluded.

**Table 3: Inequalities in Service Provision among Ethnic Groups in Ghana, 1993-2003**

Indicator	Akan (%)	Ga-Dangme (%)	Ewe (%)	Mole-Dagbani (%)
<b>1993</b>				
With electricity	39.2	53.8	29.5	15.2
Access to flush toilet	8.6	12.9	6.6	3.1
Piped water in residence	18.9	32.1	15.0	8.2
<b>1998</b>				
With electricity	51.3	60.3	39.7	24.3
Access to flush toilet	11.3	17.3	7.8	2.6
Piped water in residence	19.6	36.6	17.1	9.3
<b>2003</b>				
With electricity	59.5	58.9	40.0	28.4
Access to flush toilet	15.0	22.4	15.3	3.0
Piped water in residence	20.8	31.5	17.7	9.5

Source: UNRISD, 2010

In 2003, for instance, only about 28% of the Mole-Dagbani had access to electricity while almost 60% of the Akan and Ga-Dangme did (See Table 3). In the same year, a mere 3% of the Mole-Dagbani had access to a flush toilet while over 22% of the Ga-Dangme, who are concentrated in Greater Accra, did.

### The political dynamics of exclusion

When inequalities based on social exclusion are reproduced in the exercise of political power and access to public institutions, they undermine the confidence that excluded groups have in the government's ability to rule fairly. Socially excluded groups are often minorities, and there is often little incentive for political parties to take their interests into account.

However, when their political opportunities for voice and influence are systematically denied, their grievances can spill over into conflict. Ethnic or group conflicts are almost universally associated with political inequalities, and these are frequently related to educational and income inequalities.

Social exclusion does not inevitably lead to conflict, but it significantly increases the likelihood. For instance, a report by the Indian government into the long-standing Naxalite insurgency, which affects 125 districts spread over 12 states, found that the movement's main support has come from Scheduled Castes and Scheduled Tribes.

In Nepal, the dominant *Brahmans* and *Chhetris* maintained around a 60% presence in the legislature right through the period from 1959 to 1999, the last decade of which included the first ten years of multiparty democracy in the country. *Dalits* were almost entirely absent from the legislature during this whole period, while women were hardly represented at all. Not surprisingly, poverty, caste and ethnic identity combined with persistent political exclu-

sion, even after the introduction of democracy, to give rise to several years of civil conflict at the end of the 1990s.

In Mexico, the Zapatista uprising in the State of Chiapas can be traced to a long history of exploitation, exclusion and injustices towards the indigenous population, and is rooted in intersecting inequalities based on ethnic identity, location and poverty. In Chiapas (where the concentration of Mexico's indigenous population is very high), the proportion of the people who live on incomes below the minimum wage has been nearly three times higher than in Mexico as a whole. One of the major reasons is that they have been excluded from land reform efforts and consigned to poor and ecologically vulnerable land.

### Policy Options to Tackle Social Exclusion

The evidence presented in this Policy Brief supports the claim that social exclusion undermines progress on the MDGs and betrays the promise of social justice contained in the Millennium Declaration. Yet the MDG framework could be used to tackle social exclusion if greater attention were paid to the social, cultural and political dimensions of policies along with their technical and economic dimensions.

As a beginning, *a comprehensive policy on the collection and dissemination of information* is necessary if social exclusion is to be adequately addressed through MDG strategies. Governments need to collect appropriately disaggregated data on all their citizens in order to track their progress—or their failure to progress—as a result of development efforts.

Such data should be widely available (especially to excluded groups themselves), be subject to critical analysis and be used to inform policy measures as well as civil society advocacy efforts. Within this context, the media can be a powerful ally in the fight against discrimination and should be mobilised to inform and educate in ways that help to break down the barriers between excluded groups and the rest of society.

*Legislation against discrimination* is an important signal of a government's commitment to social justice and can provide advocacy groups the support that they need to take action. However, where social inequalities are deeply entrenched, more pro-active measures might also be necessary. For instance, many countries have sought to take *affirmative action* on behalf of excluded groups in order to break with past patterns and set new precedents for the future.

Economic exclusion can be addressed through a variety of means that *strengthen the resource base of excluded groups*. Land reform and land titling programs are important measures for transferring assets to excluded groups. Labour regulations can provide formal protection against the exploitation of workers from excluded social groups but they are most likely to be enforced when workers themselves are sufficiently organised to exert the necessary pressure.

In addition, given the spatial disadvantage of many socially excluded groups, there is a strong case for *infrastructure interventions* that seek to simultaneously address their-specific underdevelopment and to connect them to economic mainstream. These interventions include investment in transport and communication, water and sanitation, and social service infrastructure.

*Improving the outreach, quality and relevance of basic social services* for socially excluded groups is a critical precondition for achieving the MDGs that relate to health, education and other such services. For example, the abolition of user fees and the implementation of social transfers to offset costs or provide incentives to access services (such as children's education and maternal health care) can be powerful mechanisms to address such problems.

Making social services more relevant and user-friendly to men, women and children from excluded groups might include such measures as recruiting and training staff from excluded communities, relying on female staff in societies with strong norms about gender segregation, and ensuring that services are provided in languages understood by those who need them.

*Social protection measures* have also become increasingly important in promoting livelihoods and enhancing the resilience of poor people in the face of various shocks and crises. Among those programs found to be most beneficial to excluded groups are conditional and unconditional transfers, often targeted to children, the elderly or the poorest sections of society.

Social transfers clearly have a redistributive effect but where they are provided on a transparent, regular and predictable basis, they have also been found to have important developmental impacts. These include the increased capacity of groups to participate in local labour markets, upgrade their skills and knowledge, invest in productive assets, and access credit.

### Enabling macro-environment

However, such programmatic interventions will not achieve a great deal without an *enabling macro-environment*. On the economic front, it is evident that recent patterns of growth in many countries have not reduced—and have often, in fact, exacerbated—economic inequality and social exclusion.

Macro-economic frameworks that promote broad-based growth and a general expansion of economic opportunities are most likely to benefit marginalised social groups. However, such policies would still need to be supplemented by redistributive policies that directly address the intersecting dynamics of social exclusion that impair access to economic opportunities.

Fiscal policies are an important instrument for redistribution. For example, the allocation of public expenditures to particular sectors and services and the distribution of social transfers and subsidies can directly improve the social services and the forms of social protection that are of greatest relevance to poor and excluded groups.

On the governance front, the construction of a more inclusive ‘social contract’ between responsive states and active citizens can provide the enabling framework for the comprehensive approach that is needed to tackle social exclusion. Such a contract would also need to incorporate solid commitments to transparency, accountability, democratic participation and civic values.

Given their isolation from the mainstream of their society, the organisation of socially excluded groups and their mobilisation around self-identified needs, interests and priorities is a critical precondition for success. Such organisations can be built through the setting up of citizens committees, user groups of various kinds and consultative exercises. Or they can be built from below through the self-organisation of excluded groups or through the

support of civil society intermediaries.

### Strengthening MDG 8

Finally, the problems of poverty and social exclusion are not purely national in their causes or consequences. They are also the product of structural inequalities at the global level. Recognition of this condition is not adequately acknowledged in the MDGs. While MDGs 1 to 7 concern objectives to be achieved by developing countries, MDG 8 encompasses the relationships between developed and developing countries. However, not only does MDG 8 fail to address the unequal nature of these relationships—as manifested in relations on aid, trade and debt—but also it is the only MDG with no targets or indicators to monitor any form of progress.

It is extremely unlikely that developing countries will be able to achieve growth, prosperity and especially social justice without being able to build a genuine partnership of equals with developed countries at the global level. This is an ambitious agenda, easy to declare, but more difficult to achieve. To make progress on this front, rich countries should prioritise, in the run-up to 2015, a number of actions that are specifically geared to addressing social exclusion.

These would include such initiatives as supporting the role of civil society organisations in mobilising excluded groups and holding governments to account; providing support for a universal social protection floor that allows marginalised groups to cope with risk, invest in their future and lobby on their own behalf; and strengthening government capacity and commitment to the international human rights framework in order to make the social justice agenda more central to development policy.

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